SERVING THE TOTAL FOODSERVICE INDUSTRY OCTOBER 1ST, 1990

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R&I HONORS 1990 DESIGN AWARD WINNERS

NEW YORK SPECIAL

DOWNSCALING TO SURVIVE

MANHATTAN MENUS & RECIPES

New-Wave New York Entree: A Medley Of Pasta, Pesto, Peppers And Potatoes With A Low 16.7% Food Cost

Lodging Report: 10 Key Markets, Top 40 Chains

PUFF UP PASTRY PROFITS

More Inside! See Page 2

A CAHNERS PUBLICATION

OCT. 17, 1990

CONTENTS

VOL. 100 NO. 26

36 R&I EXCLUSIVE: 10 WINNING INTERIOR DESIGNS

Winners in *R&I*'s 1990 Interior Design Award Program illustrate the increasing sophistication of both designer and operator. The environments they create include all facets of the dining experience, from takeout counters to the grand cafe. This year, a distinguished panel of judges selected from a field of 74 entries 10 operations that exemplify the fine art of foodservice design.

88 THE LODGING INDUSTRY: OVERNIGHT SUCCESS?

Although hotel expansion has slowed from its hectic '80s pace, a number of markets are seeing brisk hotel business. *R&I* checks into 10 U.S. cities, from Boston to San Francisco, and reports on their occupancy rates compared to the national average, and shares hotel executives' predictions for growth across the country.

112 NEW YORK, NEW YORK: IF YOU CAN MAKE IT THERE . . .

New York diners, among the most sophisticated in the country, have sent high-priced entrees and stuffy service back to the kitchen. They're getting back a good deal—lower-priced meals ($40 for appetizer, entree and glass of wine) in more casual surroundings—as chefs struggle to build customer counts and repeat business. Our editorial restaurant tour discovers just how chefs and owners are creating exciting but more affordable dining experiences.

133 FOODS SPARKLE ON THE WHITE STUFF

What becomes an entree most? White dinnerware, according to classically trained chefs, for instance, Bradley Ogden of Lark Creek Inn. Still others, like Routh Street's Stephan Pyles, have discovered that white plates trimmed with a simple band of color lend a certain symmetry to food presentations. Our Equipment article spotlights white tabletop options.

138 TAKING A NEW BITE OF THE BIG APPLE

Yes, there are pork cheeks, end cuts of salmon, tuna tails and swordfish bellies in popular-priced dishes found today in New York's fashionable restaurants. Our food section features budget-wise, trend-setting recipes from the new school of New York chefs.

TASTE 112
Taking in stride the trend of serving fine food for less, Chef Donald Pintabona (l.) and owner Drew Nieporent of TriBeCa Grill, New York, cook up a cornucopia of moderately priced entrees.

COMMENTS
HOW IS FOODSERVICE DOING? 7

VIEWPOINT
RESTAURANT LABORATORIES 10

R&I FORUM
LETTERS 14

POINT/COUNTERPOINT
WOULD THE CIVIL RIGHTS ACT OF 1990 RESULT IN HIRING QUOTAS? 18

R&I REPORT
LODGING; WASTE WATCH; SERVICE 22
THE HILL; HELPING HAND; R&I DATA: REGIONAL SALES 23
EDUCATION; CHOICE IN CHAINS; PEOPLE & PLACES 24
DATA DIGEST; RESEARCH NOTES; TASTES OF AMERICA 28
R&I DATA: CONSUMER PRICE INDEX; FIRST PERSON; LIABILITY 30

R&I EXCLUSIVE
1990 INTERIOR DESIGN AWARDS 36

SPECIAL REPORT
OVERNIGHT SUCCESS 88

MENUS
PROMOTIONS; PRODUCTS; NEWS 107

TASTE
DOWNSCALING IN NEW YORK 112

LIQUID ASSETS
SCORING WITH CLASSIC COCKTAILS 127

EQUIPMENT
WHITE DINNERWARE SETS STAGE 133

FOOD
NEW YORK FINE FOOD FOR LESS 138

PRODUCT KNOW-HOW
FLAKY FROZEN DOUGHS 153

PRODUCT CATALOG
PRODUCT NEWS, FREE LITERATURE 161

CLASSIFIED ADS
BUYING, SELLING, CHANGING JOBS 182

ACTION EXPRESS
ADVERTISERS INDEX 192
PRODUCT RETRIEVAL 191
OPERATIONS IN THIS ISSUE 191
RECIPE INDEX 191

READER SERVICE CARD
SEND FOR FREE INFORMATION 195

R&I REPORT

RESEARCH NOTES

IN BRIEF . . .

■ Research scientists at the U.S. Department of Agriculture have developed chocolate and vanilla milkshakes that contains only 6% sugar vs. the 12% sugar found in typical milkshakes. The low-sugar beverages, made from water, nonfat dry milk, cream and other ingredients and served from a milkshake machine, were designed as an alternative to the milk requirement of Type A school lunches. They provide all the nutrients of whole milk with no more sugar than that found in chocolate milk. Students at two high schools where the shakes were tested readily accepted the low-sugar alternative.

■ Vending machine operators earned less than 4% in pretax profits in 1989, according to a survey by the National Automatic Merchandising Association. Slightly more than 50% went to cover operating expenses (including 24.7% for labor and 7.7% for commissions to the location where the vending machines are placed), while 45.4% covered the cost of products sold.

■ ■ ■ ■

DATA DIGEST

KEYS TO GREAT SERVICE

In an effort to define the traits common to companies noted for their customer service, Performance Research Associates, a Minneapolis research firm, has developed a new "superior service" database.

Four factors emerged as unique to organizations that have earned reputations for great service:

1. Employees at all levels pay attention to the small details that are important to customers.
2. Employees have confidence in other people in the organization and believe that they, too, are motivated to do as good a job as possible for the customer.
3. Managers act as positive role models of good customer service.
4. Front-line people are trained in the skills and practices that customers rank as important to satisfaction.

FAST-FOOD TECHNOLOGY

Two new developments that could be a boon to fast-food companies recently came to market, according to *Business Week* magazine.

The first, short-distance transmitters that use empty space on FM radio bands, could be used in drive-thru lanes to promote specials or entertain customers while they wait in line.

The second, already in test at some fast-food units, eliminates the waiting time while a cashier calls to authorize a purchase. A list of lost, stolen or over-the-limit cards is transmitted daily via television signals and bad cards are identified by a single swipe of the magnetic strip.

—Maureen Pratscher

A JOB WELL DONE

Monetary awards or gifts can go a long way toward building employee morale and loyalty. Service awards, based on years of employment, are the most popular among hourly employees.

Employee award	% Companies offering
Service award	50%
Christmas bonus	44
Performance bonus	38
Suggestion award	32

Source: National Restaurant Association

TASTES OF AMERICA

SUPER SOUP

With colder weather returning to many parts of the country, soup such as this corn chowder becomes a popular menu choice once again. More than two-thirds of those answering *R&I*'s 1990 Tastes of America survey ordered soup during the past year, and 36% order it more than once a month. Even in the temperate West, more than 21% are ordering soup more frequently this year than last year.

SPECIAL REPORT

■ HOTEL BUSINESS

The last decade saw a period of great expansion in America's lodging industry, but tough times have followed. R&I looks at 10 major cities to see which still enjoy

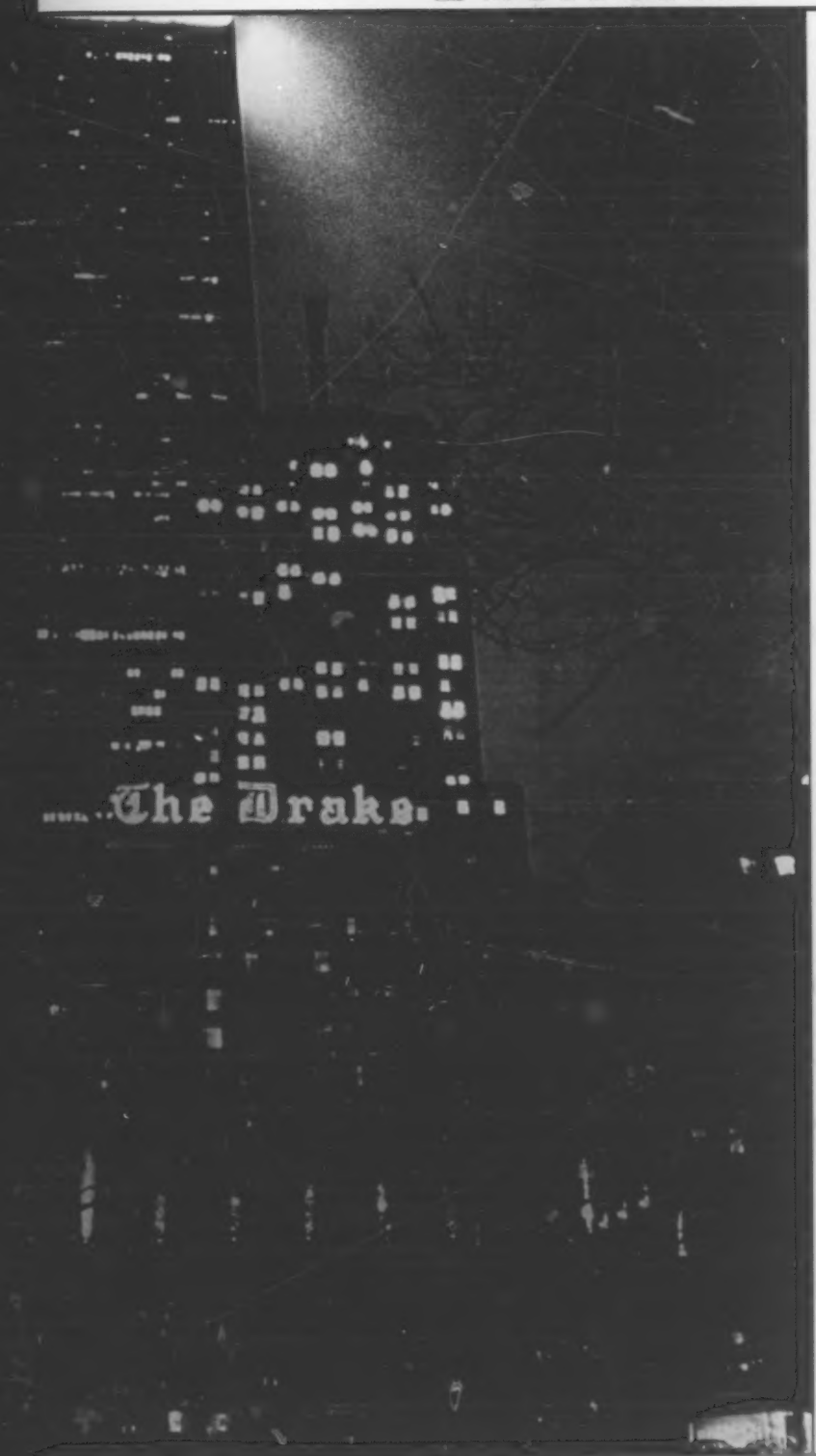
OVERNIGHT SUCCESS

By Rob Townsend

For the country's hotel industry, the early 1980s were a time of manifest destiny. Financing was easy and eager investors put up new hotels in great numbers. As the industry segmented into such subsets as all-suites, limited-service and extended-stay properties, hoteliers had more choice than ever in what type of hotel to build. What's more, these hotels didn't even have to make money. Existing tax laws allowed investors to put up trophy hotels more as jewels in a real estate collection than with any thought of making money.

Times have changed. New federal tax laws make operating profits a necessity and a sharply tightened lending market makes it tougher for even established hoteliers to finance new projects. New hotel construction has slowed, although some projects, planned during the boom years, continue to open. For the lodging industry as a whole, occupancy rates have remained flat because demand never caught up to room supply.

As fewer new hotels open, the national occupancy rate is now beginning to rise, however slightly. Through the first half of 1990, the nation's occupancy rate was 63.8%, up from 62.5% during the same period last year, according to Randy Smith, president of Smith Travel Research, Gallatin, Tenn. Barring drastic changes in domestic travel patterns,



Smith predicts a year-end occupancy rate of 64.4%. The break-even point for full-service hotels is generally between 62% and 63%, he adds.

To get a closer look at lodging's future, *R&I* examines 10 major cities, from Boston to San Francisco, and looks for such benchmarks as business climate, new hotel development and tourism increases or decreases.

Some cities, such as Los Angeles and San Francisco, enjoy occupancies higher than the national average, yet these rates are slipping due to an oversupply of rooms and fewer guests.

On the other hand, Dallas, Houston and Cleveland are strongly on the rebound. Both the economy and room demand are up in the oil industry-based cities in Texas, while new hotel development in Cleveland promises a stronger presence as a convention city.

Smith Travel Research provided information on occupancy and room rates (first-half 1990).

BOSTON

Average occupancy rate: 60.6%
Average room rate: $94.23

As bad a time as the New England region is having, Boston is having a better year, says Ed McCann Jr., executive vice president of the Greater Boston Hotel-Motel Association. In view of Massachusetts' poor financial position, however, McCann feels that 1991 might be a weaker year for lodging because of possible cutbacks in tourism and convention promotion programs.

Conventions and international tourism have been big factors in Boston's outpacing the rest of the region this year. The city's convention space has doubled in the last few years, bringing more group business to town, but McCann says that future convention bookings do not look as strong. On the other hand, international tourism has grown significantly since 1984, when the city began an aggressive overseas marketing campaign.

Because no new hotels are currently under development, existing hotels stand to benefit as customer demand catches up with the room supply. However, says David Motta, regional director of market planning for Promus

Chicago's many downtown business hotels will feel the squeeze if the nation's economy weakens.

continued on page 92

HOTEL BUSINESS

Atlanta should continue to prosper, with downtown convention business and tourism in Buckhead.

continued from page 89

Corp., Memphis, Tenn., with land prices beginning to soften, now might be the time to look at new hotel sites.

NEW YORK

Average occupancy rate: 70.9%
Average room rate: $120.15

"New York is the most important hotel city in the United States," says Peter Blyth, executive vice president of development for the Radisson Hotel Co., Minneapolis.

Blyth certainly is not alone in this opinion—new hotels continue to open in the country's largest city despite soaring real estate prices. Development continues in the Times Square area—following the lead of the Marriott Marquis, the Holiday Inn Crowne Plaza and the 638-room Hotel Macklowe recently opened, and a 450-room Embassy Suites opens this fall. Jim Holthouser, Promus' senior analyst of corporate marketing, says that construction soon will begin on a 320-room Hampton Inn near Times Square.

While some hotel companies continue to build new properties, others look to existing hotels as conversion possibilities, since the high costs of land and construction when building a new hotel can push room rates beyond a competitive level. Radisson, for example, is looking for an existing property in New York to convert to the Radisson flag.

Occupancy rates should dip slightly until the end of 1992, according to Gregory T. Bohan, principal at the accounting firm of Pannell Kerr Forster, New York. The downturn is partially due to a decrease in the number of business travelers, he says. Occupancy could slide even further with the addition in June of a 5% sales tax on rooms that sell for more than $100—this brings New York's room tax up to 21%, which might drive away even more business, says Bohan.

ATLANTA

Average occupancy rate: 62.5%
Average room rate: $60.11

Atlanta enjoys a reputation as a strong hotel town, but reasons vary from one hotel company to another. Radisson's Blyth is optimistic about Atlanta's long-term prospects, citing good business at his company's downtown convention hotel. On the other hand, Bill Watson, vice president and director of strategic marketing for Boston-based Sheraton Hotels, feels that downtown is "maxed out" with hotel rooms. He says that Sheraton is currently looking to convert a downtown convention hotel.

The Buckhead area, just north of Atlanta's downtown, has enjoyed several years of hotel growth with more additions expected. Because of Buckhead's major shopping attractions, area hotels do well on weekends with local customers, says Peter Farone, vice president of sales, The Ritz-Carlton Hotel Co., Atlanta. Despite the opening of 1,000 new rooms in 1989 and 800 more rooms opening soon, Farone feels that increasing demand should keep up with new supply.

Promus, which has an Embassy Suites in Buckhead, is less optimistic about the area's immediate future. "The area is in for some rough sailing," Motta says. "If you could open new rooms uniformly, it would be OK. But often a market opens up and so much supply shows up at once."

CLEVELAND

Average occupancy rate: 61.9%
Average room rate: $52.86

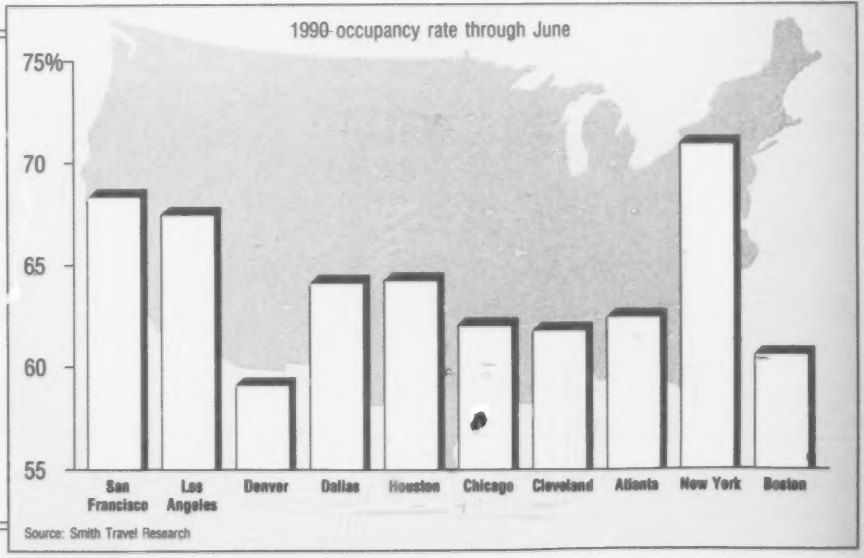
Cleveland has spit-shined its once tarnished reputation and has rallied with a renaissance of downtown business development, which includes increasing its present supply of approximately 1,300 rooms to 3,400 by the end of 1992.

By offering tax-abatement plans to multipurpose building developers, Cleveland attracted a 208-room Ritz-

continued on page 94

OCCUPANCY RATES FROM COAST TO COAST

Of these 10 cities, those on the East and West coasts boast the highest occupancy rates through June 1990. Dallas and Houston are the only other cities of the group doing better than the national average of 63.8% for the same period.



Source: Smith Travel Research

HOTEL BUSINESS

Boston's occupancy has fared better than other areas in financially beleaguered New England.

continued from page 92

Carlton hotel in conjunction with the Tower City retail/dining/office project and a 400-room Marriott as part of a new Society bank building, according to Rich Conti, senior principal in the accounting firm of Laventhol & Horwath's Cleveland office.

Room demand should rise to meet the added room supply, says Conti, because the city has a number of business and tourism draws currently open or in the works: two new downtown retail centers, a $30 million rehabilitation of convention space, and unfinished plans for both a new downtown baseball stadium and a basketball arena.

CHICAGO

Average occupancy rate: 62.0%
Average room rate: $74.08

Average occupancy for Chicago in 1990 should finish slightly under last year, says Arnold Karr, executive director of the Hotel-Motel Association of Illinois. The drop should be minimal, however, considering there are more rooms than last year, he says.

Yet Chicago's somewhat soft hotel market could get softer, Karr says, if the nation's economy takes a turn for the worse. Because 80% of Chicago's guests are in town on business, any economic downturn will affect downtown occupancies. Already, businesses are tightening employees' travel budgets, putting the squeeze on mid-priced and luxury business hotels.

Economy chains such as Econo Lodge, Charlotte, N.C., have been looking at various entries into Chicago's downtown area, with the most viable prospects being conversions, says Karr.

Karr puts his hopes for improved downtown hotel business on two factors: another convention space expansion at McCormick Place and an increase in the number of foreign travelers.

HOUSTON

Average occupancy rate: 64.2%
Average room rate: $53.49

DALLAS

Average occupancy rate: 64.1%
Average room rate: $56.81

Of Houston and Dallas, two Texas towns badly hurt during the oil bust of the early 1980s, finding out which is doing better depends on who is answering the question.

"Houston is on the upswing," says Ritz-Carlton's Farone. "The oil industry is on the rebound and the economic climate is great." Beyond the oil recovery, Farone says that when the oil industry was in bad shape, Houston's cost of living dropped, attracting a good number of new residents and non-oil businesses.

With other factors such as a new convention center, Houston will again be a strong lodging force in the next three to five years, says Bob Massey, director of development for the Western region in Holiday Corporation's Denver office.

The fact that no new hotels are under development also helps boost Houston's average occupancy.

New development might be a possibility in the Dallas area, according to Massey. "Dallas didn't suffer as badly as Houston, and parts of Dallas have gotten better very quickly," he says.

One question yet to be answered, regarding not only both cities, but the nation as a whole, is what effect on

continued on page 96

FOREIGN TRAVELERS: BOON TO HOTEL INDUSTRY

One customer segment helping to fill the many new hotel rooms on the domestic market are foreign travelers. Savvy operators will make note of this when revising restaurant and room-service menus.

Foreign visitors spent a total of $44.5 billion in this country in 1989, according to Don Wynegar, director of the U.S. Department of Travel & Tourism's office of research, Washington, D.C. Of this, $9 billion was spent on lodging.

In descending dollar amounts, travelers from the following countries spent the most money in 1989: 3.1 million Japanese spent $9.1 billion; 15.4 million Canadians spent $5.6 billion; 2.2 visitors from the United Kingdom spent $4.7 billion; 7.2 million Mexicans spent $3.6 billion; 1.1 million West Germans spent $2.4 billion; and 654,000 French citizens spent $1.7 billion.

New York remains the country's premier lodging city, with many new properties competing with well-established hotels.

HOTEL BUSINESS

After bottoming out after the early '80s oil bust, Denver's hotel business is on the rebound.

continued from page 94

hotel business the Mideast oil crisis will have. On one hand, it might bring about a return to health for the Texas oil companies, in turn boosting business in Dallas and Houston. Yet a sharp increase in gasoline prices could cause a significant reduction in automobile and airplane travel, devastating business for both corporate and transient hotels across the country.

DENVER

Average occupancy rate: 59.1%
Average room rate: $53.52

As it did in Dallas and Houston, the '80s oil bust sent Denver's hotel business reeling. In addition to that staggering economic blow, the number of new hotels in development sent Denver's room supply soaring, from approximately 12,500 rooms in 1982 to over 20,000 by the end of the decade, according to John A. Montgomery, director of hospitality industry advisory services for Laventhol & Horwath's Denver office.

The drop in occupancies flattened in 1989, however, and local hotels have started a healthy recovery process. Two reasons for this upswing are a newly opened convention center, attracting group business, and the fact that no new hotels have opened recently, nor are any in development.

Two other factors might keep Denver's future bright in the long term. The first is a second airport, scheduled to open in 1993; any new hotel construction in the Denver area will likely take place here. The other bright spot is still just a possibility: Denver is lobbying for a major-league baseball team and has passed a sales-tax initiative that would help finance a new stadium.

LOS ANGELES

Average occupancy rate: 67.4%
Average room rate: $71.26

SAN FRANCISCO

Average occupancy rate: 68.3%
Average room rate: $87.93

While both Los Angeles and San Francisco boast occupancy rates higher than all other cities profiled here, except for New York, rates are slipping.

In Los Angeles, the answer lies in a combination of new-room supply outpacing demand, less convention business than last year and layoffs in area government-contract industries. However, despite a 4.9% increase in new rooms so far in 1990, this increase is slowing, says Bill Howe, director of public relations, California Hotel & Motel Association, Sacramento.

These factors have affected economy and mid-priced properties more than luxury hotels, says John Richards, senior vice president of marketing for Four Seasons, Toronto. "Our segment has been rather recession-resistant," he says. "We are still doing very well with advertising, entertainment and executive clientele."

San Francisco's hotel industry weakened considerably after 1989's earthquake. Not only did the city lose tourists to areas on more stable ground, but it is overbuilt. New rooms so far this year have jumped 4.1% over last year, while demand has dropped .8%, says Howe. Several more hotels, in development for some time, will open in the next two years, he adds.

Ritz-Carlton will open its new hotel on Nob Hill next spring. "It's going to be a dogfight to compete in such a competitive town," says Farone.

continued on page 100

F&B SALES RISE IN '89

Traffic counts for the number of hotel guests and non-guests patronizing hotel restaurants rose 1.1% in 1989, according to a study by Laventhol & Horwath. Food and beverage sales per occupied room rose to $45.15 in 1989, up from $44.03 in 1988.

The average check per person rose slightly from $12.10 in 1988 to $12.54 in 1989. Both food and beverage costs as a percentage of sales remained flat, with food costs coming in at 31% and beverage costs at 21% in both years.

Sales per occupied room at independent hotels were much higher in 1989 than sales at chain hotels—$70.16 at independents, compared to $40.12 at chain properties. However, food costs as a percentage of sales were lower at chain hotels (30%) than at independents (32%). Beverage costs as a percentage of sales were also lower at chain hotels (21%) than at independents (23%).

Los Angeles' luxury hotels have done better than other segments, despite area employment layoffs and a decrease in convention business.

HOTEL BUSINESS

continued from page 96

THE LODGING TOP 40

1. THE SHERATON CORP.
1989 F&B sales: $1,557.7MM
1989 F&B units: 1,718

2. MARRIOTT LODGING DIV.
1989 F&B sales: $1,303.6MM*
1989 F&B units: 662*

3. HILTON HOTELS CORP.
1989 F&B sales: $1,094MM
1989 F&B units: 1,213

4. HOLIDAY INN HOTELS
1989 F&B sales: $869MM**
1989 F&B units: 2,786**

5. HYATT HOTELS CORP.
1989 F&B sales: $863.9MM*
1989 F&B units: 350**

6. DAYS INNS OF AMERICA INC.
1989 F&B sales: $610MM
1989 F&B units: 951

7. WESTIN HOTELS & RESORTS
1989 F&B sales: $541.1MM*
1989 F&B units: 495

8. INTER-CONTINENTAL HOTELS CORP.
1989 F&B sales: $475MM
1989 F&B units: 424**

9. QUALITY HOTELS INTL.†
1989 F&B sales: $414MM
1989 F&B units: 897

10. RADISSON HOTEL CORP.
1989 F&B sales: $325MM
1989 F&B units: 360

11. RAMADA HOTEL GROUP
1989 F&B sales: $271.9MM*
1989 F&B units: 117*

12. HYATT INTL. CORP.
1989 F&B sales: $242MM
1989 F&B units: 221**

13. STOUFFER HOTEL CO.
1989 F&B sales: $227.5MM*
1989 F&B units: 112

14. BALLY CASINO RESORTS
1989 F&B sales: $195.5MM*
1989 F&B units: 29*

15. EMBASSY SUITES
1989 F&B sales: $190MM
1989 F&B units: 99

16. THE RITZ-CARLTON HOTEL CO.
1989 F&B sales: $166.1MM*
1989 F&B units: 42

17. OMNI HOTELS CORP.
1989 F&B sales: $159.6MM
1989 F&B units: 86

18. RED LION
1989 F&B sales: $146MM
1989 F&B units: 129

19. HARRAH'S CASINO HOTELS
1989 F&B sales: $140.3MM
1989 F&B units: 31

20. CAESAR'S WORLD INC.
1989 F&B sales: $139.1MM
1989 F&B units: 38

21. THE TRUMP ORGANIZATION
1989 F&B sales: $129.5MM*
1989 F&B units: 30*

22. DOUBLETREE HOTELS
1989 F&B sales: $124.9MM*
1989 F&B units: 100

23. TRUSTHOUSE FORTE HOTELS
1989 F&B sales: $101.8MM*
1989 F&B units: 118*

24. LOEWS HOTELS
1989 F&B sales: $100MM
1989 F&B units: 80

25. RESORTS INTL. INC.
1989 F&B sales: $87.9MM
1989 F&B units: 26

26. PRINCESS HOTELS INC.
1989 F&B sales: $83.9MM*
1989 F&B units: 34

27. CIRCUS CIRCUS ENTERPRISES
1989 F&B sales: $81.3MM
1989 F&B units: 28

28. PRIME MOTOR INNS
1989 F&B sales: $75MM
1989 F&B units: 78

29. FAIRMONT HOTEL CORP.
1989 F&B sales: $65MM
1989 F&B units: 23

30. THE REGISTRY HOTEL CORP.
1989 F&B sales: $63MM
1989 F&B units: 15

31. THE BOYD GROUP
1989 F&B sales: $60.7MM
1989 F&B units: 27

32. POINTE RESORTS
1989 F&B sales: $55.4MM*
1989 F&B units: 11

33. ADAM'S MARK HOTELS
1989 F&B sales: $55MM
1989 F&B units: 28

34. SHOWBOAT INC.
1989 F&B sales: $53.7MM
1989 F&B units: 12

35. AZTAR INC.
1989 F&B sales: $49.9MM
1989 F&B units: 47

36. AMFAC RESORTS INC.
1989 F&B sales: $40.7MM*
1989 F&B units: 21*

37. HELMSLEY HOTELS
1989 F&B sales: $40.7MM*
1989 F&B units: 15**

38. SONESTA INTL. HOTELS CORP.
1989 F&B sales: $39.1MM*
1989 F&B units: 30

39. GOLDEN NUGGET CASINOS
1989 F&B sales: $39MM**
1989 F&B units: 18

40. GUEST QUARTERS SUITE HOTELS
1989 F&B sales: $26.9MM
1989 F&B units: 29

All figures in $ millions. Source: 1990 *R&I* 400 data.
**R&I* estimate; **company estimate
†Renamed Choice Hotels Intl. R/91

For information circle 136

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ADVERTISING INDEX

For more information on the products advertised and featured in this issue, circle the number indicated on the Reader Service Card.

Advertiser	Inquiry No.
Allen Canning (p.98-99)	64
Alto-Shaam, Inc. (p.63-67)	54
American Egg Board (p.160)	83
American Gas/Hobart (p.169)	87
American Gas/Middleby Marshall (p.135)	73
Athens/Apollo Food Group, Inc. (p.158)	81
Atkins Technical, Inc. (p.179)	109
Atlantic Food Service, A Div. of Atlantic Cheinco Corp. (p.178)	103
Bel-Terr China (p.179)	107
Bridgford Foods (p.45)	16
Calavo Growers of California (p.30-31)	13
Cambro Mfg. Co. (p.70-71,72-73)	56,57
Chef Francisco (p.141)	
Classified Advertising (p.182-190)	
Coldelite Corp. of America (p.170)	90
Columbia Crest/Stimson Lane, Inc. (p.170)	70
Continental Coffee Products (IBC)	2
Corning Inc. (p.132)	71
Custom Foods (p.122-125)	69
Electric Cooking Council (p.130-131)	
Eliason Corp. (p.173)	98
Essnor (p.178)	106
Florida Department of Citrus (p.163)	
General Foods Corp., Beverages (p.19)	7,8
General Foods Corp., Boboli (p.152)	78
General Mills, Bakery Flour (p.114-115)	67
General Mills, Foodservice Div. (p.93,95,97)	61,62,63
Golden Needles Knitting & Glove Co. (p.180)	114
Grand Metropolitan Foodservice Green Giant Brand (p.20-21)	9
Pillsbury Brand (p.154-155)	79
Heinz Co., H. J. (p.12-13)	4
Hiram Walker, Inc. (p.126)	
Hobart/American Gas (p.169)	87
Hormel & Co., George A. (p.110-111)	66
Hospitality Mints (p.177)	101
Hunt-Wesson Foodservice Div. (p.3-6)	
Iceland Seafood Corp. (p.46-47,48-49)	17,18
Image Watches, Inc. (p.176)	99
Keating of Chicago, Inc. (p.172)	96
Kraft, Inc. (p.15)	5
Lamb-Weston (p.26-27,29)	11,12
Lancaster Colony Commercial Products (p.180)	112
Land O Lakes, Inc. (p.86-87,159)	59,82
Larsen Co., The (p.117)	84
Libbey Glass Foodservice, Libbey Glass Div. (p.25)	10
McGlaughlin Oil (p.178)	104
Manchester Farms (p.175)	97
Marko, Inc. (p.174)	95
Menu Magic (p.171)	91
Merico, Inc. (p.1)	88
Middleby Marshall Inc./ American Gas (p.135)	73
Minor Corp., L.J. (p.11)	
Molded Fiber Glass Tray Co. (p.180)	113
Nabisco Brands Inc., Foodservice Div. (p.8-9)	89
National Dairy Board (p.79-84,101-106)	135,136
National Pork Producers Council (p.98-99)	150
Norpac Food Sales (p.IFC)	1
Oneida, Ltd. (p.33)	14
Pierce Foods Corp. (p.58-59,60-61)	50,51
Pioneer Flour Mills (p.108-109)	93,94

continued on page 191

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